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NATIONAL BROILER MARKET AT-A-GLANCE

Majority prices for next week are trending unchanged to lower. Trade sentiment was mostly barely steady to weak in the East and Midwest, steady in the West. Retail demand was mixed, mostly fair to moderate, with few features. Food service was moderate to good, best for fast food specials. Supplies were at least adequate with heavier weights more available and often discounted. In the parts structure, boneless skinless breasts were fully adequate to ample and priced lower to move; bone-in breasts were fully sufficient. Dark meat was readily available, but wings were in the strongest position with supplies in good balance to close. In production areas, live supplies were moderate at desirable to heavy, mostly desirable weights.

Preliminary report of prices negotiated for trucklot sales of ready-to-cook broiler/fryers fob and delivered to first receivers at major market areas week of 7/19/04-07/23/04 (cents per lb)

US GRADE A (Including branded product)

AREAS	MAJORITY	RANGE	WTD AVG	LOADS
Delivered to First Receivers				
Chicago	76.00-79.00	76.00-83.00	78.60	33
Los Angeles	86.00			
New York	78.00-81.00			
Southeast Area FOB Dock Equivalent				
Mississippi	80.00-82.00	79.00-90.00	81.81	90

GEORGIA F.O.B. DOCK PRICES Georgia F.O.B. Dock Broiler/Fryers-Parts Prices (Mon/Wed/Fri) Georgia f.o.b. dock quoted price on broilers/fryers for this week's trading is 81.00 cents based on ice-packed USDA grade "A" sized 2 1/2 to 3 pound birds.

PRELIMINARY FOB DOCK OR EQUIVALENT

LOADS	RANGE	FRIDAY PRELIM. WTD. AVG.
986	78.00-84.00	80.71
Georgia f.o.b. dock confirmed preliminary weighted average price on ice packed parts:		
ITEM	WTD. AVG.	VOLUME
(CENTS PER POUND)		(000 POUNDS)
LINE RUN TENDERS	257.50	1,289
BREASTS - B/S	248.50	5,476
BREASTS - WHOLE	138.00	1,530
THIGH MEAT - B/S	113.00	1,040
LEG QUARTERS	35.00	7,481
WINGS	117.50	2,867

This information is supplied by the GA Dept. of Agriculture's poultry market news service.

MIDWEST Preliminary majority prices for next week's trading into the Chicago area were 2 cents lower than Monday's final majority price. Whole broiler/fryer market tone was barely steady to steady. Offerings of additional whole fryers ranged limited to available. Retail demand was fair to moderate. Food service movement was moderate to good, especially into fast food channels. Floor stocks were generally adequate, instances short. Sizes were desirable. In the parts complex, supplies of boneless skinless breasts ample, bone in breasts and leg quarters fully adequate, wings adequate to close. Trade sentiment was barely steady to weak on boneless skinless breasts and bone in breasts, barely steady on leg quarters, steady on the balance.

SOUTHERN Trade sentiment was no better than steady to weak. Demand entering the weekend was slow to fair, moderate for active fast food promotions. Supplies were more than sufficient to handle limited trade needs. In the parts structure, trading was slow to fair. Breast items were mixed with tenders in balance, but remaining cuts fully sufficient to ample and discounted. Dark meat was at least adequate with light interest, but wings were balanced to close and moving well. In production areas, live supplies were moderate at mixed, but mostly desirable weights.

WESTERN The market tone was steady with trading for next week's deliveries at mainly unchanged prices. Offerings adequate. Retailer demand moderate. Dealers anticipated satisfactory weekend clearances.

Ads this week:

Southern California – southern wholebody 78-99, California cut up 159, boneless breasts 269-499, marinated 299, IQF 3# 599, boneless thigh meat 199, boneless leg meat 98-129, marinated 129, breasts 99-199, leg quarters 68-89, marinated 99, 10# bags 290-690, wings 168, thighs 77-169, drums 69-169, 5# bag 297, roaster 119, cornish 2 for \$5, deli cooked- rotisserie 478-499, fried 8pc mixed 399-499, 15pc legs & thighs 499, hot wings, strips, fritters 399/lb.;

Northern California – California wholebody 99-129, boneless breasts 499, boneless thighs 299, breasts buy 1 get 1 free, legs 159, leg quarters 129, drums 129.

NORTHEAST Trucklot buying activity on ready-to-cook whole broiler/fryers increased under normal weekend demand, but was noted as no better than moderate overall. Offerings of all sizes were adequate to fully adequate with scattered discounting noted. The market tone was barely steady to weak. In the parts complex, boneless-skinless breasts were ample and sharply discounted to clear. Bone-in breasts were fully sufficient. Dark meat cuts were at least adequate. Wings were clearing satisfactorily.

DELMARVA Movement of ready-to-cook whole birds was no better than fair. Seller offerings remained available, particularly on the over 3.00 pound sizes which were competitively priced and slow to clear. Live supplies were moderate; weights were mostly desirable to heavy. Processing schedules were moderately heavy and included some operations on Saturday. Less than trucklot asking prices were 1 cent lower at 79 to 93 cents. Trade sentiment was weak. In the parts complex, boneless/skinless breasts, and in some instances, bone-in breasts were readily available. Leg cuts were fully adequate. Wings were adequate and in fairly good balance.

*BROILER/FRYER CURRENT NEGOTIATED PRICES FOR IMMEDIATE DELIVERY INCLUDES MOSTLY MULTIPLE-DROP SHIPMENTS OF BRANDED AND WING TAGGED TO NEW YORK CITY FROM DELMARVA

BRANDED U.S. GRADE A

RANGE	75-96
WEIGHTED AVERAGE	81.81
NO. OF BOXES	7,469
CUMULATIVE	
	07/12/04-07/16/04 84.48
	07/14/03-07/18/03 61.95
NO. OF BOXES	
	07/12/04-07/16/04 40,090
	07/14/03-07/18/03 42,651

*7 of 7 plants reporting.

JULY 15					SOUTHERN STATES BROILER/FRYER PARTS					JULY 16	
ITEM	POUNDS		MAJORITY	WTD	POUNDS	MAJORITY		WTD	WEEKLY		
	(000)	RANGE		AVG		(000)	RANGE	AVG	(000)	WTD AVG	
BREAST - B/S	1,007	213.00-331.00	220-225	222.42	1,002	209.00-312.00	215-220	218.33	4,907	225.62	
TENDERLOINS	144	227.00-282.00	227-230	238.86	124	227.00-282.00	227-230	240.77	760	238.12	
BREAST - LINE RUN	80	131.00-141.00	132-136	134.43	80	129.00-139.00	130-134	132.43	397	134.52	
FRONT HALVES	TOO FEW TO REPORT				TOO FEW TO REPORT				240	120.53	
LEGS	79	35.00-50.00	38-40	40.51	78	35.00-50.00	38-40	40.50	388	40.59	
LEG QUARTERS (BULK)	510	24.00-32.00	26-27	26.76	508	24.00-32.00	26-27	26.74	2,678	26.76	
LEG QUARTERS (4/10)	925	24.00-36.00	29-30	29.60	915	24.00-36.00	29-30	29.53	4,625	29.77	
WINGS (WHOLE)	290	93.00-122.00	-	97.79	299	93.00-122.00	94-96	98.25	1,345	97.73	
WINGS (CUT)	423	109.00-119.00	117-119	117.20	614	110.00-119.00	118-119	117.86	2,569	116.98	
DRUMSTICKS	TOO FEW TO REPORT				TOO FEW TO REPORT				126	53.02	
THIGHS	TOO FEW TO REPORT				TOO FEW TO REPORT				140	52.86	
B/S THIGHS	TOO FEW TO REPORT				TOO FEW TO REPORT				346	106.16	
*****					*****						
WHOLE BODY INDEX BASED ON SOUTHERN STATES PARTS					WHOLE BODY INDEX BASED ON SOUTHERN STATES PARTS						
TRADING FOR JULY 15, 2004 F.O.B. DOCK.					TRADING FOR JULY 16, 2004 F.O.B. DOCK.						

<u>RANGE</u>	<u>TODAY'S AVERAGE</u>	<u>RANGE</u>	<u>TODAY'S AVERAGE</u>	<u>5-DAY AVERAGE</u>
70.50 - 79.50	73.00	68.50 - 78.00	70.88	73.54
The Index is intended solely as an indicator of values for commodity-type product and does not represent industry's willingness to sell or ability to buy.				

NORTHEAST BROILER/FRYER PARTS - Trucklot buying activity was mixed; while normal increases were noted moving into the weekend, the boneless-skinless breast situation has left many dealers scrambling to move product and minimize losses amid declining market values. Offerings of bone-in breasts were adequate to fully adequate. Dark meat items were manageable. Wings were clearing satisfactorily. Retail and distributive draw was fair to moderate. Trade sentiment was unsettled. The market tone was weak on breast items, about steady on dark meat cuts and at least steady on wings.

ICE PACKED B/F PARTS, DLVRD TO FIRST RECEIVERS IN POOL TRUCKLOT AND TRUCKLOT QUANTITIES, CENTS PER LB. JULY 16

JULY 15				JULY 16			
ITEM	CURRENT NEG		WTD		CURRENT NEG		WTD
	TRADING*	AVG**			TRADING*	AVG**	
BREAST - B/S	225-230	224.35	600,972		220-225	225.21	733,773
TENDERLOINS	225	223.60	46,160		225	220.63	123,400
BREAST - WITH RIBS	127-128	136.29	119,440		125-126	136.31	184,800
BREAST - LINE RUN	127	131.08	91,800		125	128.44	110,680
LEGS	49-50	46.60	279,000		49-50	47.20	331,522
LEG QUARTERS (BULK)	32-33	34.63	312,166		32-33	34.82	290,428
DRUMSTICKS	42-43	49.17	129,130		42-43	48.16	169,640
THIGHS	38-39	46.19	88,740		38-39	49.83	86,640
B/S THIGHS	97-98	97.04	54,720		97-98	99.64	76,240
WINGS (WHOLE)	100-101	110.72	115,600		100-101	110.05	118,360
BACKS AND NECKS (STRIPPED)	10-12	12.05	36,480		10-12	11.93	32,560
LIVERS (5 POUND TUBS)	35-40	28.68	16,080		35-40	25.16	14,800
GIZZARDS (HEARTS)	55-60	59.54	16,000		55-60	57.05	23,800

INCLUDES: NY CITY METRO. AREA, RI, NORTHERN NJ, MA, CT, PA (NORTHEAST OF HARRISBURG). * TODAY'S NEG. SALES AS OF 11:30 A.M.

** WTD AVG PRICE OF ALL GRADES AND BRANDS OF PRODUCT SHIPPE, OR TO BE SHIPPED AS OF 1:30 P.M.

ESTIMATED SLAUGHTER OF BROILER-FRYERS (IN THOUSANDS)

	ESTIMATED		ACTUAL		AVG WT		ACTUAL		AVG WTS	
	(1,000)		(1,000)				(1,000)			
	07/16	07/15	07/14	07/13	07/14	07/13	07/09	07/07		
ALA	4,521	4,075	4,006	3,984	5.15	5.18	4,649	5.23		
ARK	5,217	5,514	5,391	5,275	4.96	5.09	6,610	5.16		
DELMARVA	2,350	2,192	2,238	2,254	5.60	5.56	2,289	5.55		
KY-LA-TN	2,468	2,032	1,755	1,866	5.16	5.07	2,235	5.04		
MISS	3,238	3,131	3,991	3,057	5.40	5.44	3,917	5.45		
NC	3,868	2,420	2,437	2,425	6.19	6.24	3,095	6.31		
TEXAS	2,423	2,460	2,004	2,510	5.28	5.20	2,542	5.21		
TOTAL	24,085	21,824	21,822	21,371	5.32	5.35	25,337	5.37		
MON-FRI 10,920(A)							98,592(A)			

(A) Weekly cumulative for states listed above. Broiler-fryer slaughter under federal inspection for 16-Jul-04 and 17-Jul-04 is estimated to be 36,034,000 head down 5.23 percent from a week ago and up 11.33 percent from a year ago.

(Last week 38,021,000, last year 32,368,000)

Weekly broiler-fryer slaughter under federal inspection for the weekending 17-Jul-04 is estimated to be 160,959,000 head up 10.25 percent from a week ago, and up 2.39 percent from a year ago.

(Last week 145,999,000, last year 157,206,000)

SOUTHERN CALIFORNIA (L.A. AREA) PROCESSED POULTRY, DELIVERED TO RETAILERS

	RANGE
FRYERS	97-99
ROASTERS 4# & UP	95-107
HENS UNDER 5#	
HENS OVER 5#	71-81
DUCKS	
RABBITS-WHOLE	
RABBITS-CUT UP	

SAN FRANCISCO PROCESSED POULTRY DELIVERED TO RESTAURANTS AND INSTITUTIONS

	RANGE
FRESH FRYERS	116
ICE PACK	109
ROASTERS 4# & UP	110
ICE PACK	108
HENS OVER 5#	93
ICE PACK	95
DRY PACK	95
DUCKS	162-185

YOUNG CHICKENS SLAUGHTERED Under federal inspection, classified by live wt., week ending 03-Jul-04 (Preliminary),

	(A) Fast food/ Food service	(B) Retail	(C) Deboning
	4.20 Lbs & down	4.21-5.25 Lbs	5.26 Lbs & Up
	THOUSANDS		

Head	29,306	21,281	41,199
Avg Weight	3.63	4.81	6.27
% of total /1	32%	23%	45%

COMPARISONS

Last week	25,441	22,809	53,405
Avg Weight	3.76	4.74	6.37
% of total /1	25%	22%	53%

Same week, yr ago /2	26,710	22,277	39,430
Avg Weight	3.88	4.86	6.05
% of total /1	30%	25%	45%

To date/2004	692,811	562,868	1,172,593
To date/2003	645,991	602,343	1,202,797

total to 100% due to rounding. /2 Comparable week.

(A) This weight class generally denotes chickens marketed in the fast food and food service industries. May also include cornish hens.

(B) This weight class generally denotes chickens marketed in the retail industry.

(C) This weight class generally denotes chickens used in further processing. May also include heavy roasters sold in retail channels.

LIVE POULTRY SLTRD UNDER FEDERAL INSPECTION W/E 10-July-04
(PRELIMINARY)

	YOUNG CHICKENS	LIGHT HENS	HEAVY HENS	TOTAL HENS	DUCKS
	THOUSANDS				

HEAD	145,999	1,361	1,229	2,590	439
AVG WT	5.15	3.27	8.10	5.56	6.65
LAST WEEK	160,885	1,452	1,354	2,806	480
SAME WK YR AGO	159,849	1,153	1,515	2,668	347
AVG WT	5.23	3.74	8.04	6.18	6.68
TO-DATE/2004	4,178,324	36,058	34,995	71,053	12,513
TO-DATE/2003	4,125,868	43,861	36,879	80,740	11,200

(A) The estimated number of fryers available for marketing based on the 2-week revised average chick placements 6 to 7 weeks earlier was 164.0 million head. Estimated U.S. slaughter for this period was 147.8 million head, or 16.2 million less than estimated available.

GRAYSTONE SMALL ANIMAL AUCTION - JULY 13, 2004

PRICES PAID PER POUND, EXCEPT AS NOTED

AI PAPERS REQUIRED TO SELL ALL OUT OF STATE POULTRY

	RANGE		RANGE
Muscovy Ducks - Drakes	1.30	Banty Hens	2.50 - 3.50 ea.
Pekin Ducks	5.00ea.	Leghorn Roosters	1.50 ea.
Red Fowl 4-5 LBS	.50 - .70	Pigeons	2.00 - 2.50 ea.
Red Fowl 5-6 LBS	.70 - 1.00	White Pigeons	3.75 - 4.00 ea.
Crossbred Fowl 5-9 LBS	.50 - 1.00	Rabbits 4-6 LBS	.50 - .80
Crossbred Roosters		Rabbits 6-9 LBS	.50 - .80
4-6 LBS	.90 - 1.10	Bunnies	.50 - 1.00
Crossbred Roosters		Guinea Pigs	.25 - .50
7-11 LBS	.70 - 1.00	Goats	57.00 ea.
Guinea Fowl	.60 - .80	Kid Goats	37.00 - 45.00 ea.
Banty Roosters	4.50 - 6.00ea.	Doves	5.00 ea.
		Chukars	1.50 - 2.00 ea.

Total Coops Sold 512

EASTERN REGION MISCELLANEOUS POULTRY

FOR CURRENT DELIVERY FOR THE WEEK OF 12-JULY-2004

DUCKLINGS: PRICES NEGOTIATED BY FIRST RECEIVERS, US GRADE A, 4-5 POUNDS, DELIVERED IN TRUCKLOT AND POOL TRUCKLOT QUANTITIES

ORIGIN	FROZEN	FRESH
LONG ISLAND MOSTLY	143-145	149-151
MIDWEST	127-131	128 - 133

MOSTLY

ROASTERS: PRICES NEGOTIATED BY FIRST RECEIVERS, US GRADE A AND PLANT GRADE, 5 POUNDS AND UP, DELIVERED

	RANGE	MOSTLY
ICE PACKED (12 PER BOX)	83.00-92.50	88.00-91.50
VACUUM PACKED (6-9 PER BOX)	68.00-85.50	68.00-75.50

SQUABS: NEW YORK AREA WHOLESALE PRICES, FROZEN, PLANT GRADE, DOLLARS PER DOZEN, 1 TO 10 BOXES

12 OZ.	60.48-71.28
14 OZ.	66.96-77.92
16 OZ.	73.44-86.67

THE EASTERN REGION INCLUDES:

CT,DE,FL,GA,MA,MD,ME,NC,NH,NJ,NY,PA RI,SC,VA,VT,WV

CENTRAL REGION DUCKLINGS Prices unchanged. Trade sentiment steady. Demand remained moderate to instances fairly good. Schedules full-time. Weights were desirable. Prices paid to first receivers for 10-18oz boneless breast at \$4.25-5.25, bone in legs at \$1.35-1.45, gizzards at \$1.35-1.40, wings at \$0.30-0.50, livers at \$0.75-1.70, and feet at \$0.80-1.15.

NEGOTIATED BY FIRST RECEIVERS FOR US GRADE A DELIVERED IN TRUCKLOT AND POOL TRUCKLOT QUANTITIES, 4-5 POUNDS, WEEK OF 12-JULY-2004

ORIGIN	FROZEN	FRESH
MIDWEST AND OTHERS	116-134	118-139
MOSTLY		

**ESTIMATED U.S. SLAUGHTER COMPARED TO
ESTIMATED FRYERS AVAILABLE FOR MARKETING.**

WEEK ENDING	MILLION HEAD SLAUGHTERED	MILLION HEAD AVAILABLE	PCT	AVG WT
JUNE	5	144.6	163.1	89%
	12	165.1	164.1	101%
	19	157.7	164.6	96%
	26	164.0	164.3	100%
JULY	3	162.8	164.2	99%
	10	147.8	164.0	90%
YEAR TO DATE	4229.2	4312.8	98%	
JULY	17	165.2		
	24	167.1		

BROILER/CATTLE/HOG WEEKLY ESTIMATED SLAUGHTER

	Under Federal Inspection				
	THOUSANDS				
W/E	07/17/04	07/10/04	% CHG	07/19/03	% CHG
Broilers	160,959	145,999*	+10.25	157,206	+2.39*
Cattle	635	529	+20	742*	-14
Hogs	1,914	1,615	+19	1,832*	+04

*ACTUAL

NATIONAL CANNER FOWL MARKET Sales were too few to report on heavy cannery. Light cannery were unchanged when compared to a week earlier. Demand was moderate on lights; and generally fair on heavy cannery with most dressed product being used internally. Offerings were clearing and ranged from about adequate to adequate. Processing schedules were normal. Trade sentiment was at least steady.

CENTS PER POUND, CURRENT NEGOTIATIONS, WITHOUT FREIGHT COST

LIGHT CANNER HENS **HEAVY CANNER HENS**
(LINE RUN WITHOUT NECKS) (WITHOUT NECKS)

25.5-31 MAJORITY 27-28 TOO FEW TO REPORT

CENTS PER POUND, CURRENT NEGOTIATIONS, FREIGHT COST INCLUDED

LIGHT CANNER HENS **HEAVY CANNER HENS**
(LINE RUN WITHOUT NECKS) (WITHOUT NECKS)

27-34 MAJORITY 30-30.5 TOO FEW TO REPORT

LIGHT TYPE HENS

CENTS PER HEAD, GENERALLY FOR REMOVAL WITHIN THE NEXT 10 DAYS (INCLUDES HANDLING, FREIGHT AND ANY OTHER CHARGES, WEIGHTS AVERAGE ABOUT 3.50 POUNDS)

EASTERN REGION LIGHT LIVE HEN Majority prices were unchanged when compared to last week. Demand was fair to moderately good. Offerings of spent hens increased and were at least adequate to fully adequate for trade needs. Processing schedules were usually heavy but normal. Opinions on removal cost were generally steady.

	RANGE	MAJORITY
REMOVAL COST	5-12	9-10.5

SOUTH CENTRAL LIGHT LIVE HEN Trading levels were generally unchanged from the past week. Demand was fair for fully adequate supplies of spent hens from production areas. Schedules were normal. Finished product sales were fair and clearing. Trade sentiment was steady.

	RANGE	MAJORITY
REMOVAL COST		TOO FEW TO REPORT

NORTH CENTRAL LIGHT LIVE HEN Prices were unchanged. Offerings were adequate to fully adequate this week with offerings for next week reported as adequate to tight. Demand was fairly good to good with rendering demand increasing. Trade sentiment steady.

	RANGE	MAJORITY
REMOVAL COST	5-11	6-8

HEAVY TYPE HENS (7 POUNDS AND UP) *

PRELIMINARY PRICE, CENTS PER LB., GENERALLY FOR SLAUGHTER THE WEEK OF 19-JUL-04

SOUTHEAST HEAVY LIVE HEN Sales were too few to report prices. Demand was moderate for fully adequate offerings. Processing schedules were reported as normal to instances heavy. Supplies of finished product were well cleared. The undertone was steady.

RANGE	MAJORITY
AT FARM BUYER LOADING	TOO FEW TO REPORT
AT FARM PRODUCER LOADING	TOO FEW TO REPORT
FOB PLANT	TOO FEW TO REPORT

SOUTH CENTRAL LIVE HEAVY-TYPE HENS Trading was too few sales to report prices. Demand was moderate for adequate to fully adequate supplies of spent hens. Schedules were normal. Finished product sales were also normal and clearing. Trade sentiment was at least steady.

	RANGE	MAJORITY
AT FARM BUYER LOADING		TOO FEW TO REPORT

* WEIGHTS UNDER 7 LBS. SUBJECT TO DISCOUNT.

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WEST COAST LIGHT LIVE HEN Plant schedules moderate. Offerings adequate.